DOCUMENT RESUME

ED 250 450 CE 039 857

TITLE	Proffitt, Dorsey & Huff, Inc. An Administrative Assistant Position Simulation. Employee's Manual. Office Occupations.
INSTITUTION	Pickens Area Vocational-Technical School, Jasper, Ga.
SPONS AGENCY	Georgia State Dept. of Education, Atlanta. Office of Vocational Education.
PUB DATE	82
NOTE	26p.; For related documents, see CE 039 856-858.
PUB TYPE	Guides - Classroom Use - Materials (For Learner) (051)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	*Employee Responsibility; *Employment Practices; Employment Qualifications; Guidelines; Insurance Companies; Job Skills; *Office Management; *Office Occupations Education; *Office Practice; Personnel Management; Postsecondary Education; *Simulation
IDENTIFIERS	*Administrative Assistants; Georgia; Rules and Regulations

ABSTRACT

This employee's manual, part of a series of publications for use in implementing an administrative assistant simulation designed for students enrolled in a postsecondary-level office applications laboratory, outlines the office rules of a fictitious insurance company, Proffitt, Dorsey & Huff, Inc., that functions as both a sales and a service organization. Addressed in the office rules are office hours, attendance, overtime, lunch and recess periods, personal time, holidays, vacations, accidents, change of address or personal status, visitors and solicitors, equipment, telephone, and general information. Also included in the guide are various pieces of information relating to the structure and implementation of the simulation, including an organization chart, a position description, a flow-of-work chart, an introduction to office rules, a list of supplies, equipment, and references, a list of jobs to be performed in the simulation, an evaluation form to be used with employees of the fictitious company, and an errors-and-omissions checklist. (MN)

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OFFICE OCCUPATIONS

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Proffitt, Dorsey & Huff, Inc.

An Administrative Assistant Position Simulation

Employee's Manual

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Georgia Department of Education

OFFICE OCCUPATIONS

Developed and Produced
Under Contractual Agreement with

Division of Program Development
Office of Vocational Education
Georgia Department of Education
Atlanta, Georgia 30334
Charles McDaniel, State Superintendent of Schools
1982

UPD 7728/7-82

PROFFITT, DORSEY & HUFF, INC.

An Administrative Assistant Position Simulation

Prepared by

Pickens Area Vocational-Technical School
Jasper, Georgia

Revised by

Georgia State University
Atlanta, Georgia

Project Supported by

Office of Vocational Education
Division of Program Development
Georgia Department of Education
Atlanta, Georgia 30334

Dr. Charles McDaniel, State Superintendent of Schools

1982

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FOREWORD

This administrative assistant position simulation has been developed for use in an office applications laboratory at the postsecondary level. Its purpose is to give the student an opportunity to become familiar with the tasks and duties that may be performed by an administrative assistant.

Appreciation is expressed to Mr. K. Gerald Allen, Project Coordinator and to Mrs. Nancy Dorsey and Mrs. Nancy Proffitt, business education instructors, for the development of these materials.

Appreciation is also expressed to the many business education instructors throughout the state who field tested, evaluated, and provided invaluable feedback on these materials as a part of this revision effort.

Sincere appreciation goes to Dr. John H. Lloyd, Director, Program Development Division, for his continued support, encouragement, and leadership in this revision effort.

Dr. Harmon Fowler
Project Director
Office Simulation Project

Mrs. Doris Bash-Wooten
Assistant Project Director
Office Simulation Project

GENERAL INFORMATION

Proffitt, Dorsey & Huff, Inc. is an independent insurance agency which represents numerous insurance companies. This agency was founded in 1923 by Jonathan Andrew Huff. It has grown since that time into a well-known agency. The agency was incorporated in 1951; and Jonathan Andrew Huff, II, is now serving as president of the company. The offices are located at 1257 International Boulevard in Suite 13 of the Cain Tower, Atlanta, GA 30001.

Currently employed in the company are nine (9) agents (called Sales Account Executives). The support staff consists of an Administrative Services Manager, two (2) automobile rating clerks, one (1) marketing and claims manager, one (1) receptionist/file clerk, two (2) typists, and the newly created position of Administrative Assistant to the Administrative Services Manager.

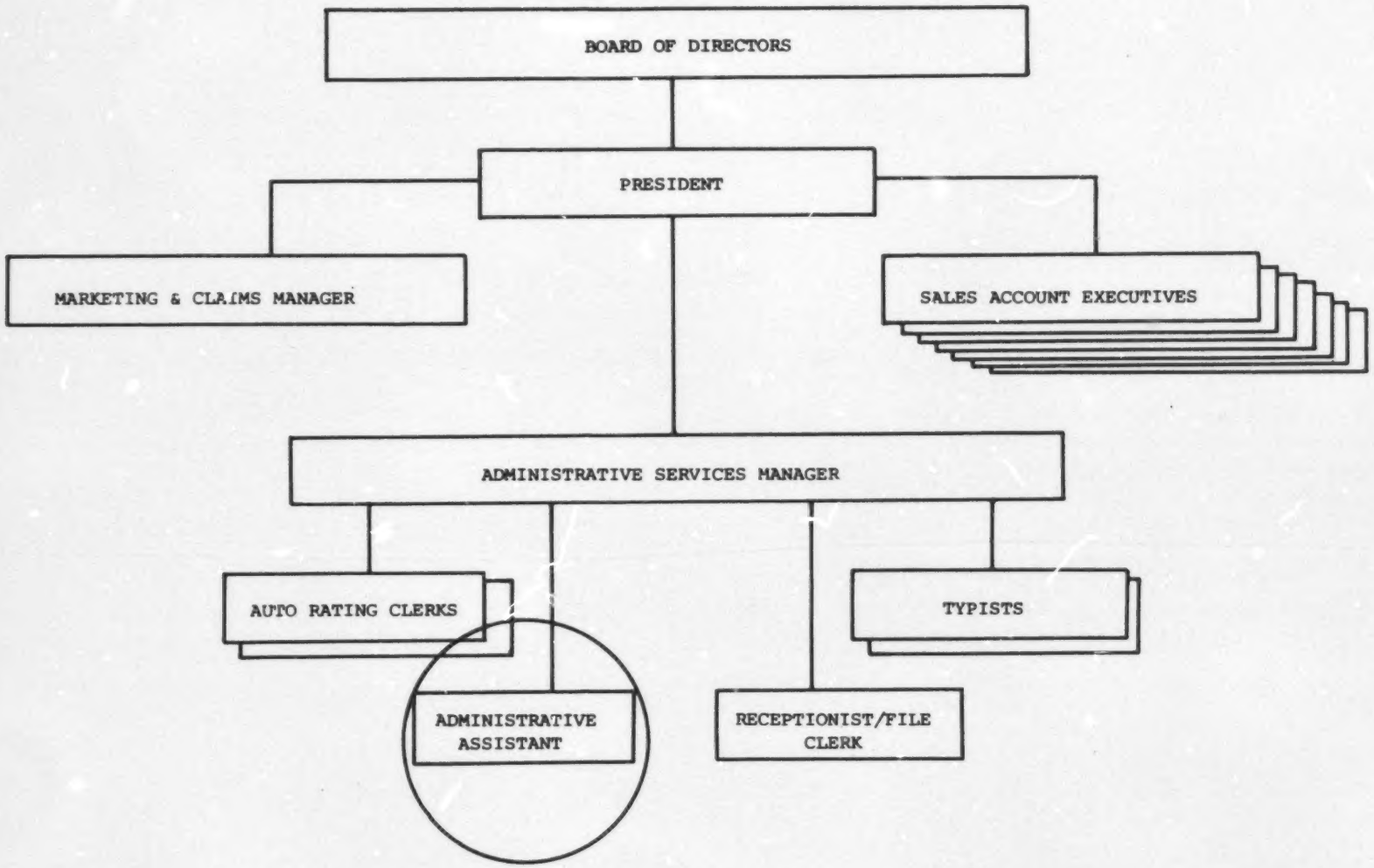
This company is both a sales and a service organization. Its purpose is to produce a profit that is sufficient to provide a fair and equitable return on the stockholders' investments. The function of the company is to provide property and casualty coverages and service to its customers. Since this agency represents several insurance companies, it is the responsibility of the Sales Account Executives to be knowledgeable of each insurance company and type of insurance in order to better serve the particular needs of the customers.

The office work consists of all the paperwork involved in providing insurance coverages to clients, processing claims, adding endorsements, supplying premium information, and dealing with the various home offices of those companies represented. It also includes dealing with prospective and existing customers.

In 1977 the agency employed the firm, Financial Data Services, to perform all accounting functions including issuance of claims checks, receivables, payables, monthly payroll, and income tax preparation. This outstanding computer services firm has consistently performed these functions for less than one-half the estimated cost of maintaining a specialized department within the agency.

PROFFITT, DORSEY, & HUFF, INC.

ORGANIZATION CHART



Position Description

POSITION: Administrative Assistant

SUPERVISOR: Administrative Services Manager, N. Lee Jordan

SUBORDINATES: None

PURPOSE: To assist the Administrative Services Manager in writing of new business and the servicing of the existing accounts. To assist in the preparation of letters, handling of correspondence and transcription of dictation.

PRIMARY FUNCTIONS:

(1) Assists the Administrative Services Manager in the completion of applications of new or renewal business.

(2) Reviews new and renewal policies and endorsements for accuracy as to typing, coverage, and rating.

(3) Prepares correspondence as dictated and initiates own correspondence with companies and clients.

(4) Transcribes dictation for all Sales Account Executives. Dictation includes letters, memorandums, and forms. Transcribes any handwritten materials. This requires a knowledge of terminology and spelling applicable to the insurance industry and use of transcribing equipment.

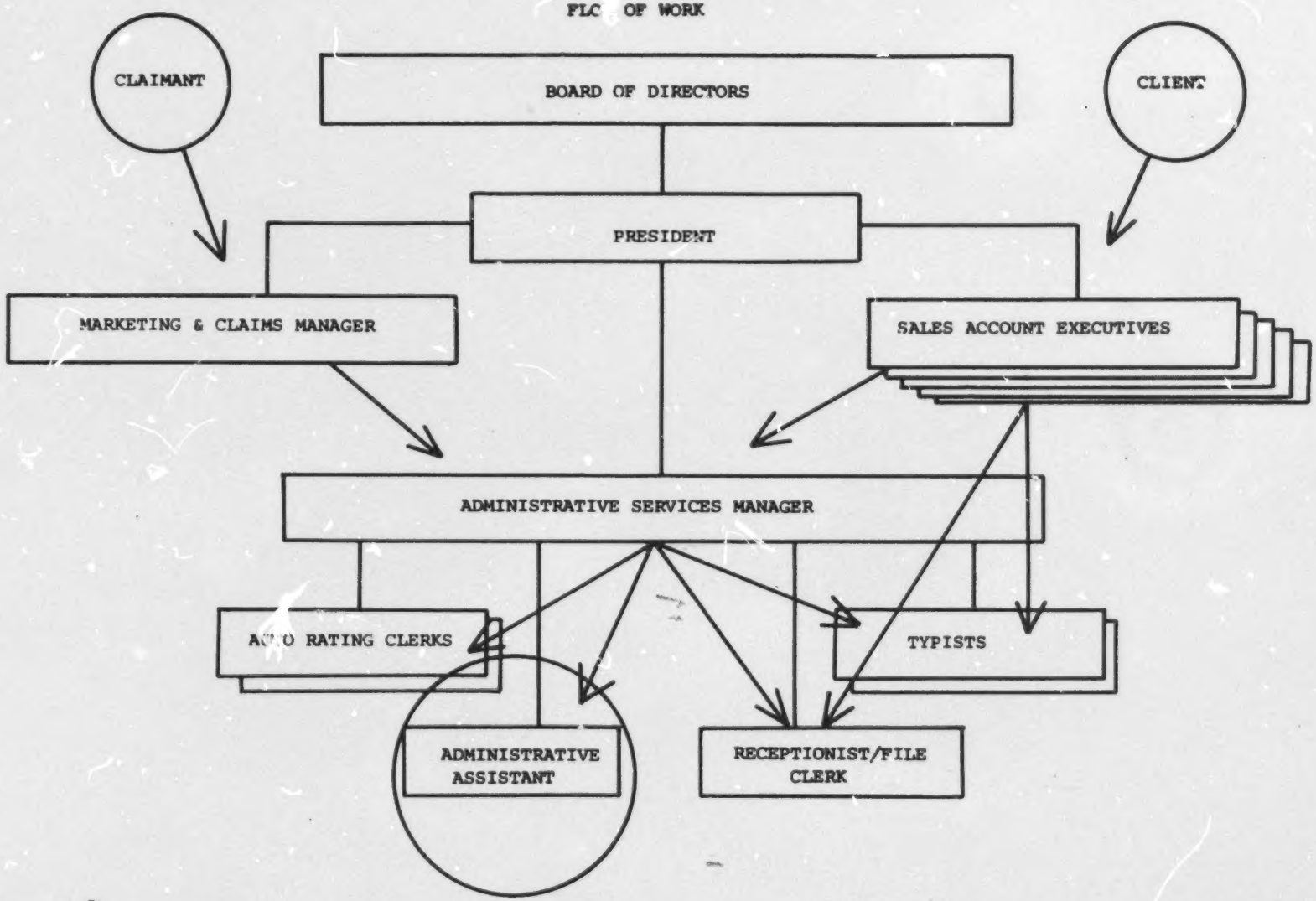
(5) Maintains an information retrieval system.

(6) Handles travel arrangements, itineraries, expense reports; arranges business meetings; takes minutes at meetings; drafts speeches and other general secretarial duties.

(7) Performs other routine tasks as needs arise.

PROFFITT, DORSEY, & HUFF, INC.

FLOW OF WORK



INTRODUCTION OF OFFICE RULES

We are proud of our office and loyal cooperation of the office staff which has contributed so much to vitalizing our motto, "Service Beyond the Contract."

We sincerely request your cooperation by observing the brief office rules which are attached, as they are a condition of your employment and will have an important bearing on your progress with us.

Sincerely yours,

J. A. Huff, II

Jonathan A. Huff, II

OFFICE RULES

Office Hours

(Monday through Friday - 8:15 a.m. to 4:45 p.m.)

Our employment contracts are made on the basis of a 40-hour work week. It is unfair to your fellow employees who start their work promptly on opening hour and make no preparation for leaving until closing hour for anyone to do otherwise. For operational convenience, exceptions to regular office hours are made when deemed necessary by Management.

Attendance

Regular attendance is extremely important in efficiently operating our business, and we must ask that you make every effort to be regular in your attendance. If it becomes necessary for you to be absent from the office for any reason, you are required to report your absence as promptly as possible in order for arrangements to be made for someone to handle the necessary matters on your desk. Should it be necessary for you to leave the office, except for specified periods, you should secure the approval of the Administrative Services Manager and advise the switchboard. You will normally be paid for short-term absences due to personal illness. This does not include time off due to illness of children or other members of your family. This rule is incorporated to equalize family obligations as between individuals.

A "SIGN IN" sheet is kept at the switchboard desk. Each employee is to post the time of their arrival in the morning and their departure time in the afternoon. The "SIGN IN" sheet will be in the Administrative Services Manager's office after 8:30 a.m. Employees hired on an hourly or by day basis must complete time cards. No employee should start work more than 15 minutes prior to their official starting time nor continue work more than 15 minutes after their official stopping time without prior approval from the Administrative Services Manager.

Overtime

Employment contracts are made on the basis of a 40-hour work week and overtime pay will not start until you have worked 40 hours.

Overtime work (exceeding 40 hours) is not permitted without prior approval of the Administrative Services Manager.

Lunch and Recess Period

Our luncheon period extends for a period of one hour. Any variation in your lunch period should be reported to the Administrative Assistant.

Employees are allowed a privilege of a recess not to exceed 15 minutes each morning and afternoon. Recess should be taken between 10:00 and 11:00 o'clock in the morning and between 2:30 and 3:45 in the afternoon.

Eating at your desk at any time is not considered good office practice and you are requested to refrain from doing so.

Each department should have at least one competent person in attendance at all times. Exceptions must be cleared with the Administrative Services Manager.

Personal Time

Periodically, situations arise where it is impossible to handle personal business on Saturdays. We will permit an employee to report for work two (2) hours late or leave two (2) hours early in order to take care of these situations. Prior approval must be secured from the Administrative Services Manager. It is not expected that this privilege will be abused. Should the time out exceed two (2) hours, it will be considered a one-half day or full day's vacation, as the case may be.

Holidays

The holidays which we are presently observing include: New Year's Day; Good Friday; Memorial Day; July 4th; Labor Day; Thanksgiving and the Friday after; and Christmas Day. Notices will be posted on the bulletin board confirming these holidays and also listing any variations therefrom in January of each year.

Two floating holidays may be taken at the employee's discretion provided a 48-hour advance request is made of the employee's manager. One day shall be considered earned during each full five months of calendar year employment.

Vacations

Vacations with pay are granted permanent full-time employees on the following basis:

(1) Employment of 15 years or longer - 4 weeks.

(2) Employment of 5 to 15 years - 3 weeks.

(3) Employment of 1 full year to 5 years - 2 weeks.

(4) Employment prior to July 1st but less than 12 months - After 60 days of full-time, continuous service, vacation is accumulated at the rate of one working day for each full month of service.

(5) Employment on or after May 1st - No vacation during current year.

(6) All vacation must be used in the calendar year.

When a holiday falls within your scheduled vacation, an extra day may be added to the vacation period.

Vacations should be taken between April 1 and October 1. The firm prefers, since tests have shown continuous vacations to be more beneficial, that two (2) weeks be taken without interruption. If your length of service is five (5) years or longer, you should arrange for your additional earned vacation to be taken at a later date but within the designated vacation period.

The latter provision is to minimize the problems we could experience in our effort to continue, effectively, the work flow during the vacation season. Insofar as possible, the period requested by each employee will be granted; but if two or more employees request the same period and a choice must be made, the senior employee in length of service will be given first preference, provided the request is received by the Administrative Services Manager no later than April 1.

Accidents

Injuries sustained by you or a visitor in your presence should be promptly reported to the Administrative Services Manager or the Administrative Assistant.

Change of Address or Personal Status

Any change in your name, address, marital status, telephone number, or your dependents, should immediately be brought to the attention of the Administrative Department so that company records and your personnel file may be kept up to date.

In instances of pregnancy, you are requested to inform the Administrative Services Manager as soon as the condition is determined. At that time your employment tenure will be discussed.

Visitors and Solicitors

Employees are not expected to have personal visitors during office hours, except in emergencies. Vendors and solicitors are not permitted to operate in the office and upon entering will be referred to the Purchasing Manager.

Equipment

Everyone should exercise care in the use of all equipment. Desks should be kept as neat as possible, and at the close of the day all desk tops and tops of all file cabinets should be left neat and orderly.

If any piece of mechanical equipment is not working properly, the Maintenance Manager should be notified. Please do not attempt to make repairs on equipment.

Telephone

The exceedingly heavy demand upon the Company's telephone equipment is such that the PBX Operator has been instructed to take numbers for all identifiable personal calls, except emergency calls, so that you may return them on your break at lunch time. Employees must refrain from making personal calls during working hours.

General

Employees are expected to treat as STRICTLY CONFIDENTIAL THE AFFAIRS OF THE OFFICE, THEIR PERSONAL RELATIONSHIP WITH THE COMPANY, AND THE COMPENSATION THEY RECEIVE.

Files and other records must not be given to persons other than those associated with this organization and must not be removed from the office without the approval of the Administrative Services Manager.

The method of operation in this office calls for a minimum of direct supervision for all employees. This means that each employee is on his/her own to a large extent and is expected to strictly observe the rules listed herein and good office etiquette, especially as related to visiting in the office, irrelevant conversation, absence from desk, etc.

Upon separation, any insurance accounts being serviced by separating employees revert to firm ownership and employee has no right or authority to designate future servicing agent.

The firm is proud of the vitality which its Associates and staff have imparted to our motto, "Service Beyond the Contract." We depend upon you to carry out this tradition in your relationship with office personnel as well as clients of this office.

SUPPLIES, EQUIPMENT, AND REFERENCES

You will need the following items in your work here at Proffitt, Dorsey & Huff, Inc.

Supplies

1 typewriting eraser
1 correction tape
2 pencils
75 carbon sets
75 letterheads
75 envelopes
1 package of index cards
10 second sheets
1 note pad
All other standard office supplies

Equipment

Student desks (preferably "L" shaped)
Student chairs
Typewriters (one long carriage)
Calculators
Filing cabinet
Mimeograph process duplicator
Spirit process duplicator
Transcribers with earphones
Card file box
Telephones (desirable)

References

Dictionaries
Airline Timetables
Office Supply Catalogs
Postal Information
ZIP Code Directory
Telephone Directories
All other standard office reference manuals

The following is a listing of the jobs that you will perform as Administrative Assistant here at Proffitt, Dorsey & Huff, Inc. The jobs are numbered and arranged sequentially in your STUDENT MANUAL package. There are a total of twenty (20) jobs.

1. Employment Application and Interview
2. Employee Applicant Test
3. Establishment of Reference File
4. Preparation of Premium Notices
5. Proofreading and Retyping from Drafts
6. Composition and Preparation of Correspondence and Table
7. Editing, Correcting, and Typing Letters and Memos
8. Completion of Accident Report and Composing and Typing Letter of Transmittal
9. Dictation and Transcription of Four Letters
10. Transcription and Reproduction of Correspondence
11. Composing and Typing Letter with Carbons, Envelopes, and Carbon Copy Notations
12. Composing, Typing, and Reproducing Mailout; Composing Typing, and Reproducing Letter; Addressing Envelopes; Inserting Correspondence
13. Preparation of Two Account Summaries
14. Editing, Retyping, and Reproducing Letter to Stockholders; Typing and Reproducing Memo to Stockholders; Supplying Omitted Zip Codes and Preparing Nine Envelopes; Inserting Correspondence
15. Transcription from Cassette - Notice of Annual Meeting and Design of Proxy Form for Printer
16. Analyzing, Establishing and Recording Transactions to Petty Cash Fund
17. Composing and Typing Follow-Up Letters
18. Resolving Personnel Problems
19. Composing and Typing Two Letters and Four Memorandums concerning Travel Arrangements; Completing Request for Cash Advance; Preparing and Typing Itineraries
20. Preparing and Typing Expense Reports for Five Employees

EVALUATION

Periodically, your work here at Proffitt, Dorsey & Huff, Inc. will be formally evaluated. Although evaluation forms may be changed from time to time, they all will basically consist of the items of information that are given on the sample form below.

Sample Employee Rating Form

Name_____Position_____Date_____

Rating Scale:

5 = Excellent	Work is extremely well done; does more than is expected; first in line for promotion.
4 = Very Good	Work is well done; usually puts forth more effort than is expected.
3 = Good	Does good work but does only what is required.
2 = Fair	Is careless about work at times; puts forth minimum effort.
1 = Unsatisfactory	This rating may be the result of any of the following: Poor attendance, Tardiness, Work incomplete, Work of inferior quality, Negative attitude toward work.

PRODUCTION

___Quality of Work--work is always neat; does not overlook typing errors; is accurate in calculations.

___Quantity of Work--displays efficient use of time.

___Job Knowledge--is familiar with all aspects of job; does not always depend on others to explain how to perform assigned duties.

___Judgment--has ability to make sound decisions.

___Organization--has ability to plan work; establishes priorities well.

PERSONAL QUALITIES

__Dependability--is reliable in carrying out duties.

___Cooperation--works well with other employees.

___Courtesy--shows consideration for others; is polite, displays good manners.

ATTENDANCE

___Attendance Record--is not absent frequently, and advises supervisor when absence must occur.

___Punctuality--shows up for work on time; does not take longer breaks than allowed.

ATTITUDE

___Toward Job--shows enthusiasm; does not complain often.

___Toward Other Employees--courteous and helpful; does not gossip about other employees.

___Toward Supervisor--follows supervisor's requests; is able to appreciate constructive criticism.

PERSONAL APPEARANCE

___Clothing and skin apparently clean; practices dental hygiene; nails clean; hair clean and neat; no offensive odors.

___Makeup and jewelry appropriate for the office.

WHAT MIGHT THIS EMPLOYEE DO TO IMPROVE JOB PERFORMANCE?

WHAT ARE SOME OF THE APPARENT OUTSTANDING ATTRIBUTES OF THIS EMPLOYEE?

OTHER COMMENTS:

E & O CHECKLIST

Errors and omissions can be costly. While no one is perfect, the following checklist can assist you in keeping costly errors and omissions from occurring.

_____1. Do I route calls and correspondence to the proper specialist when I am unfamiliar with what is being requested?

_____2. Do I refrain from advising clients in fields outside insurance as accounting or legal?

_____3. Do I document in writing changes in coverage to include deductibles, restrictions, limits, coinsurance, etc.?

_____4. Do I review and recommend in writing new coverages as appropriate because of changes in the insurance environment or product availability?

_____5. Do I file and maintain correspondence as called for under existing File Destruction Procedures?

_____6. Do I confirm all declinations of coverage by the Insured in writing?

_____7. Do I order renewals well in advance of expiration? Do I utilize the Data Services Renewal Worksheet on commercial accounts?

_____8. Do I review with the client at anniversary all values and liability limits? In addition, do I review all reports of value and audits for indication of risk changes?

_____9. Do I issue a binder or coverage memorandum to all interested parties, insured, mortgagee, loss payee, and company when the renewal policy does not arrive by expiration date? Do I place a copy of this binder or memorandum in a suspense file to be certain a policy has been issued or premium declared?

____10. Do I check all renewal policies to see that they are as ordered?

____11. Do I complete all applications thoroughly, and use the PDH Commercial Application unless the company has specifically requested the use of their forms?

____12. Do I suspense all applications and change requests to be sure each is acted upon by the company?

____13. Do I review excess policies to be certain that they are consistent with primary policies?

____14. Do I prepare endorsements and change requests and send to the company on a timely basis?

____15. Do I ask clients to repeat technical information I have given him or her so that I know he or she understands what I have said?

____16. Do I understand what I tell my clients?

____17. Do I promise only what I can deliver?

____18. Do I check all policies being canceled for additional insureds, loss payees, mortgagees, and certificates of insurance?

____19. Am I familiar with the State of Georgia legal requirements concerning cancellation and the nonrenewal of the different lines of insurance I work with?

____20. In my contacts with clients, do I demonstrate courtesy, competency, and professionalism on my part?

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Title IX - Myra Tolbert, Coordinator
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